

Appendix O
CONSER Metadata Application Profile
(Sample draft pages)

Data Element

M/A/NR Notes/Cataloging Guidelines

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Leader		M	System-supplied except as below
	06 Type of record	M	
	07 Bibliographic level	M	(Default code currently = "s")
	08 Type of control	M	(Default = "blank")
	17 Encoding level	M	
	18 Descriptive cataloging form	M	
001	Control number	M	System-supplied
003	Control number identifier	M	System-supplied
005	Date and time of latest transaction	M	System-supplied
006	Fixed-length data elements – additional material characteristics	A	
	<i>It is required to code only the first byte of the 006 for additional material characteristics, "Form of material."</i>		
	<i>When complete, guidelines will be numbered and numbers inserted following this direction whenever it appears.</i>		
007	Physical description fixed field	A	
	<i>It is required to code only the first two bytes of the 007: "Category of material" and "Specific material designation."</i>		
008	Fixed-length data elements – general information		
	00-05 Date entered on file	M	System-supplied
	06 Publication status	M	
	07-10 Date 1 Beginning date of publication	M	
	11-14 Date 2 Ending date of publication	A	
	15-17 Country	M	Code in lieu of 260 \$a
	21 Type of continuing resource	M	
	22 Form of original item	A	Code only for original microforms
	23 Form of item	M	
	28 Government publication	A	
	34 Successive/latest entry	M	Default = "0"
	35-37 Language	M	
	38 Modified record	A	
	39 Cataloging source	M	
010	Library of Congress control number	M	
022	ISSN ‡a, ‡y	A	(‡z used by ISSN centers only)
030	CODEN designation	A	If readily available to cataloger
035	System control number (USMARC)	M	System-supplied
040	Cataloging source	M	System-supplied
041	Language code	A	Code \$a only

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042	Authentication code	M	
086	Government document classification	A	
1XX	<i>After applying existing rules and rule interpretations, in any case where the cataloger is still in doubt as to whether the main entry should be under title or corporate body, if the title is distinctive, designate the title proper as main entry and record relevant body access point(s) as added entry heading(s); if the title is generic, i.e., if the title consists solely of words indicating type of resource and/or periodicity of resource, choose the corporate body as the main entry.</i>		
100	Main entry – personal name	A	
110	Main entry – corporate name	A	
111	Main entry – meeting name	A	
130	Main entry – uniform title †a, †n, †p	A	
	<i>It is not required to create or add a uniform title (either as a main entry heading or in conjunction with a personal or corporate name main entry heading) for translations or language editions. Instead, use an added entry (in addition to any 775 linking field) to provide collocation with the original language edition. This is an exception to the general policy stated under Linking Fields below that "it is not required to make added entries (730, 740) that duplicate the linking field access points."</i>		
	<i>It is not required to create or add a uniform title (either as a main entry heading or in conjunction with a personal or corporate name main entry heading) in order to resolve conflicts according to AACR 25.5B. Create uniform titles only for these two categories: 1) when cataloging a monographic series, or 2) when the title consists solely of a word or words indicating the type of resource or the periodicity of the resource, e.g., "monthly newsletter," "journal," "biennial working papers," and there is no 1XX in the record. Continue to create or add uniform titles as required for legal materials and other cases of collocating (as opposed to "distinguishing") uniform titles.</i>		
	<i>If an institution needs a unique title for citation purposes, use the rules for uniform titles to create a provisional key title in field 222.</i>		
210	Abbreviated title †a, †b	A	<i>Do not put in 246</i>
240	Uniform title †a, †n, †p	A	<i>See cataloging guidelines for 130 field</i>
245	Title and statement of responsibility		
	†a Title proper	M	
	†h Medium	A	
	†n Number of part/section	A	
	†p Name of part/section	A	
	†b Other title information	NR	
	<i>Generally, it is not required to transcribe other title information unless it provides clarification or support to the title proper that otherwise might appear misleading without the other title information.</i>		
	<i>Record parallel titles and acronyms in field 246. It is not required to repeat parallel titles to be repeated in 245 \$b.</i>		
	†c Statement of responsibility	NR	
	<i>It is not required to transcribe a statement of responsibility of any kind if authority records exist or are being established and/or updated in the national authority file. In cases where no authority record will be created or updated, transcribe the statement of responsibility as usual in the bibliographic record so that usage can be documented.</i>		
246	Varying form of title †a, †n, †p	A	

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	<p>Record variant titles that appear prominently in the resource being cataloged, and which a user might reasonably consider to be the title. LCRI 21.30J provides extensive guidance in this area. Also record as variant titles minor title changes. Do not spend a lot of time looking for information buried in the text of the item that could possibly be considered a variant. Refer to guidance in RI 21.30J regarding not creating all possible added entries when titles exhibit multiple possible variations. Record in field 246 (as opposed to 245 \$b) acronyms and those language forms of parallel titles found on the chief source that are specified in the LCRIs for parallel titles. Use \$f to indicate applicable date ranges for parallel titles, if these change over time.</p> <p><i>It is not required to provide information on the source of the variant title. Accordingly, indicator values for variant titles can be coded 3[blank] with the exception of added entries for minor title changes. In these cases only, record the minor title change as usual: 246 1 [blank] with subfield i "Title varies..." Record any abbreviated titles (including abbreviated citation titles that might appear in a running title position on the first page of an article) in field 210, not in field 246.</i></p> <p><i>For online serials, as a general rule of thumb, do your best to find the earliest issue appearing on the site. Once you have located that issue, generally consider recording as variant titles only titles appearing in sources that can be accessed by scrolling up or down one or two pages from that issue's title page or title screen or by clicking on a prominently displayed icon or menu choice on a home page or a main menu page.</i></p>		
247	Former title ‡a, ‡n, ‡p	A	<i>Use only for integrated entry</i>
250	Edition statement	A	
260	Publication, distribution, etc.		
	‡a Place of publication	A	<p><i>It is required to supply only the first named place of publication for all but online resources (see below). Is it not required to supply any additional places of publication, even places in the home country of the cataloging agency.</i></p> <p><i>For online resources: if a place of publication is readily available (within one page link of the home page and/or issue being described) supply that place in field 260 \$a. Otherwise, supply [S.I.] in field 260 \$a. Code the fixed field country code as appropriately as possible.</i></p>
	‡b Name of publisher	M	
	‡c Date of publication	NR	<i>See cataloging guidelines for 362 field</i>
300	Physical description		
	‡a Extent (SMD)	A	<i>This element is not required except for non-print formats</i>
310	Current publication frequency	M	<i>Use 310 not 008</i>
321	Former publication frequency	NR	
			<i>Always provide the current frequency in field 310. It is not required to provide the former frequency in field 321. If using copy where the frequency in field 310 is no longer current and a field 321 is present, update field 310 to reflect the current frequency and replace existing field 321 information with "Frequency varies" regardless of how many former frequencies there are.</i>
362	Dates of publication/designation		
	First indicator "1" unformatted style	M	

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	<p><i>It is not required to supply dates in 260 \$c. In all cases, supply dates of publication/designation in a note in an unformatted style (field 362, first indicator 1, "Began with..."). This should make it clearer to the user that the information provided refers to beginning and ending dates of the publication, rather than a library's holdings.</i></p> <p><i>It is not required to use abbreviations when supplying this information; formulate the note as usual (i.e. keep the usual order and structure of the note) but instead of using prescribed abbreviations, transcribe what appears on the item (i.e., if a word is spelled out on the item, spell it out; if a word is abbreviated on the item, use the abbreviation as found.). Numbers may be transcribed as found or, if numbers are written out on issues, they may be recorded in Arabic numerals, whichever is easiest.</i></p> <p><i>Optionally, add a 515 note to record new series designations, changes in numbering, etc. formerly recorded as formatted field 362 information.</i></p>		
4XX	Series statement/title	NR	
	<p><i>If series authority records exist or are being established and/or updated in the national authority file, it is not required to transcribe a series statement or note. Supply only the authorized form of the series name in the bibliographic record, using the 8XX field. Record variant forms of the series title in the authority record. Document changes in the series statement over time in a 500 note on the bibliographic record. In cases where no series authority exists or will be created, transcribe the series statement so that usage can be documented.</i></p>		
500	General note(s): source of title, DBO, LIC	M	<i>Designated notes only</i>
	<p><i>Routinely provide only the following 500 notes, but provide them on all records: Source of title, issue on which the description is based (DBO); latest issue consulted (LIC), if applicable.</i></p>		
515	Numbering peculiarities note	NR	<p><i>Optionally, may be used to record new series designations, changes in numbering, etc. formerly recorded as formatted field 362 information.</i></p>
530	Additional physical form available note	NR	<p><i>Use 776 \$i rather than a 530 note, to describe any additional physical formats available.</i></p>
533	Reproduction note	A	
534	Original version note	A	<i>Natl. Library of Canada use only</i>
538	System details note	A	<p><i>For direct access electronic resources, it is not required to make a 538 note except in cases when it is necessary to indicate the type of operating system or the make and model of the computer(s) on which the resource is designed to run.</i></p> <p><i>For remote access electronic resources, make a note on mode of access only if the resource is accessed other than through the World Wide Web.</i></p> <p><i>When using copy that includes 538 information that is outdated, replace the outdated information with current information only if the current information is appropriate under the above guidelines; otherwise delete the outdated information. Do not provide current information for the sole reason of adding to or replacing outdated information.</i></p>
546	Language note	A	<p><i>Record the language of the publication in the fixed field (008 bytes 35-37). If the item's main content is in more than one language, record all languages in \$a of field 041 but do not code the other subfields. Record information about translations, different languages of summaries, tables of contents, or accompanying material only in an eye-readable 546 note.</i></p>
550	Issuing body note	NR	

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	<i>It is not required to use 550 or other notes simply to justify added entries. If a corporate body's name has changed over time, update the authority records in the national authority file to reflect these changes and add a note to the authority record to indicate the dates the different bodies have been associated with the resource. If no authority record will be created or updated, document the usage through transcription in the bibliographic record (either by supplying a 245 \$b or c, or a 550 note).</i>		
555	Cumulative index/finding aids note	A	
580	Linking entry complexity note	NR	<i>It is not required to supply linking information in a 580 note. Use linking entries whenever possible.</i>
600	Subject added entry – personal name	A	
610	Subject added entry – corporate name	A	
611	Subject added entry – meeting name	A	
630	Subject added entry – uniform title	A	
650	Subject added entry – topical term	A	
651	Subject added entry – geographic name	A	
655	Index term – genre/form	A	
700	Added entry – personal name	A	
710	Added entry – corporate name	A	
711	Added entry – meeting name	A	
730	Added entry – uniform title	A	<i>Prefer linking field; see cataloging guidelines for 130</i>
740	Added entry – uncontrolled related title	A	<i>Prefer linking field; see cataloging guidelines for 130</i>
752	Added entry – hierarchical place name	A	<i>Newspapers only</i>
7XX	<i>Follow CONSER and MARC guidelines for supplying all linking fields except: 773 (host item), 774 (constituent unit entry), and 787 (non-specific relationship), which are not required. It is not required to make added entries (730, 740) that duplicate the linking field access points.</i> <i>Use 776 \$i rather than a 530 note, to describe any additional physical formats available.</i>		
765	Original language entry	A	
767	Translation entry	A	
770	Supplement/special issue entry	A	
772	Supplement parent entry	A	
775	Other edition available entry	A	
776	Additional physical form entry	A	<i>Use in lieu of 530</i>
777	Issued with entry	A	
780	Preceding entry	A	
785	Succeeding entry	A	
8XX	<i>See cataloging guidelines for 4XX field</i>		
800	Series added entry – personal name	A	
810	Series added entry – corporate name	A	

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811	Series added entry – meeting name	A	
830	Series added entry – uniform title	A	
856	Electronic location and access	A	
	<i>Remote access electronic resources generally have a URI associated with the resource. CONSER records should contain generally-accessible URLs that point to the publisher's version of the resource or to a version in a trusted archive. Local URLs or password-protected URLs should not be recorded in the national level record.</i>		
	‡u Uniform resource identifier	A	
	‡3 Materials specified	A	